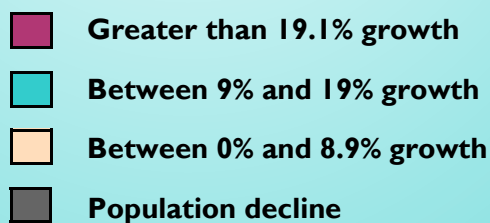
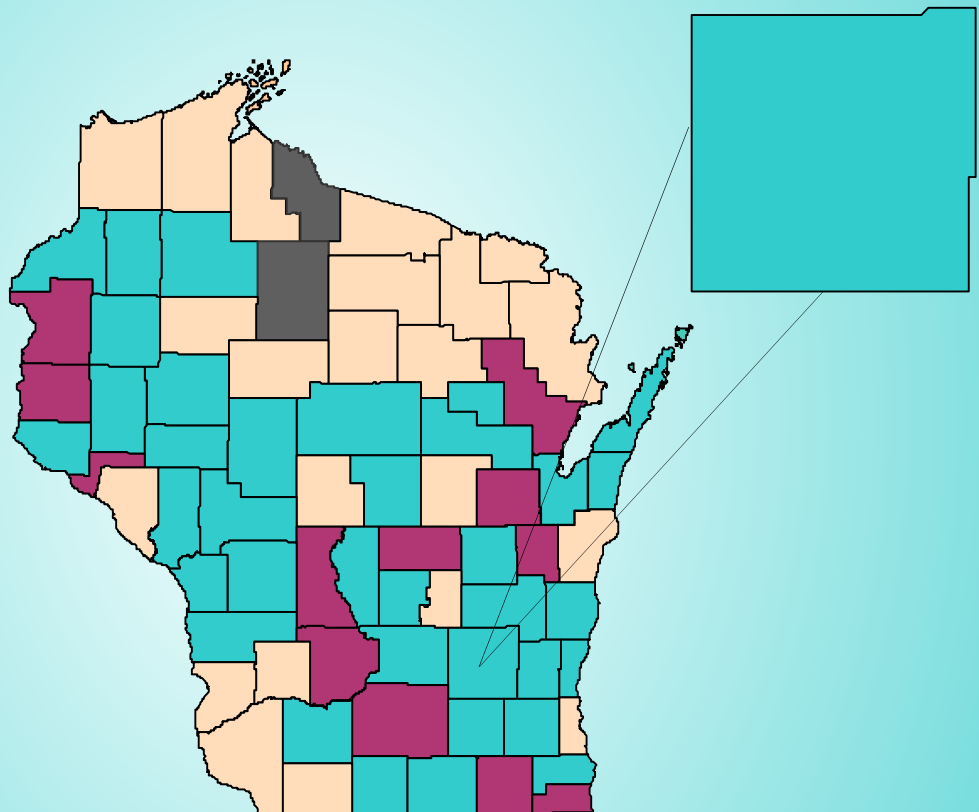


Dodge County Workforce Profile

Projected population growth from 2000 to 2020



Source: Wisconsin Department of Administration, Demographic Services Center.
Statewide population growth is projected to be 13.9 percent from 2000 to 2020.

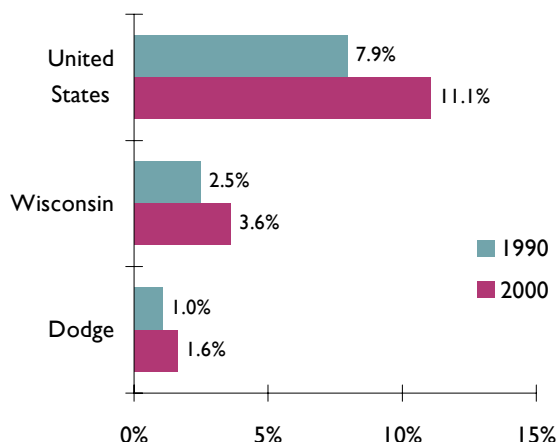


County Population

Population trends affect the supply of workers, the ability to attract employers and the demand for goods and services. Dodge County added roughly 1,186 people or 1.4 percent to its population between the April 2000 Census and the January 2002 population estimate. This growth rate sits squarely between the national rate and the statewide rate and just a bit higher than average for a non-metropolitan county in Wisconsin. Population growth was not evenly distributed throughout the county: over three quarters of it occurred in just six municipalities (Watertown, Mayville, the Town of Fox Lake, the Town of Beaver Dam, the City of Beaver Dam and the City of Fox Lake).

Of the 1.4 percent growth rate, roughly 0.2 percent was natural increase (births minus deaths) and about 1.2 percent was net migration. This is fairly typical for a non-metropolitan Wisconsin county. Dodge County stands out from other non-metropolitan counties because a greater share of its residents came from other counties in Wisconsin, while a smaller share of its residents came from other states. In 1990, nearly eight percent of U.S. residents were foreign-born, and by 2000, this had grown to over 11 percent. Wisconsin started with fewer foreign-born residents and its foreign born population grew less quickly (in relation to its 1990 level). The contrast was still sharper in Dodge County. (See graph below.)

Share of Foreign-born Residents



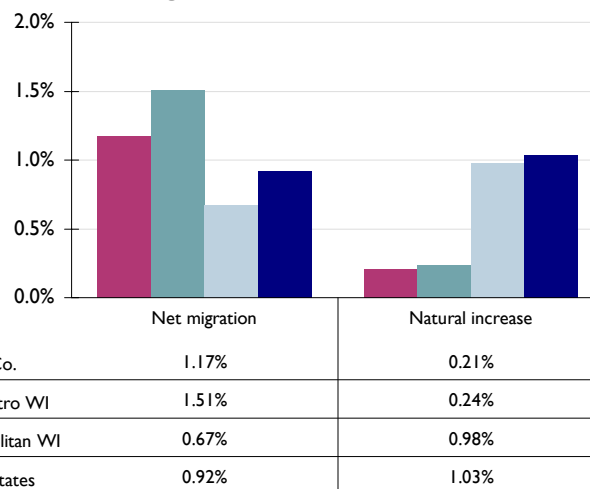
Source: US Dept. of Commerce, Census 2000, Summary file-4, QT-P14

Total Population

	April 2000 Census	January 1, 2002 estimate	Percent change
United States	281,421,906	286,923,000	2.0%
Wisconsin	5,363,701	5,453,896	1.7%
Dodge County	85,897	87,083	1.4%
Largest Municipalities			
Beaver Dam, City	15,169	15,251	0.5%
Watertown, City*	8,063	8,335	3.4%
Waupun, City*	7,436	7,308	-1.7%
Mayville, City	4,902	5,124	4.5%
Horicon, City	3,775	3,772	-0.1%
Beaver Dam, Town	3,440	3,538	2.8%
Fox Lake, Town	2,402	2,608	8.6%
Juneau, City	2,485	2,498	0.5%
Ashippun, Town	2,308	2,347	1.7%
Lomira, Village	2,233	2,282	2.2%

* Dodge County portion only

Net migration and natural increase



Source: Wisconsin DOA, Demographic Services Center & US Census Bureau

The county experienced fewer births from 1992 to 2001 than it had between 1982 and 1991. In 2001, 65 percent of Dodge County's births were to mothers under 30 years old and 89 percent were to mothers under 35. Natural increase (or lack thereof) affects population growth; and age demographics, in turn, have an impact on natural increase. The number of female residents in their 20s and 30s affects future birth rates and population growth rates.

Dodge County Workforce Profile

Population Projections by Age Groups in Dodge County

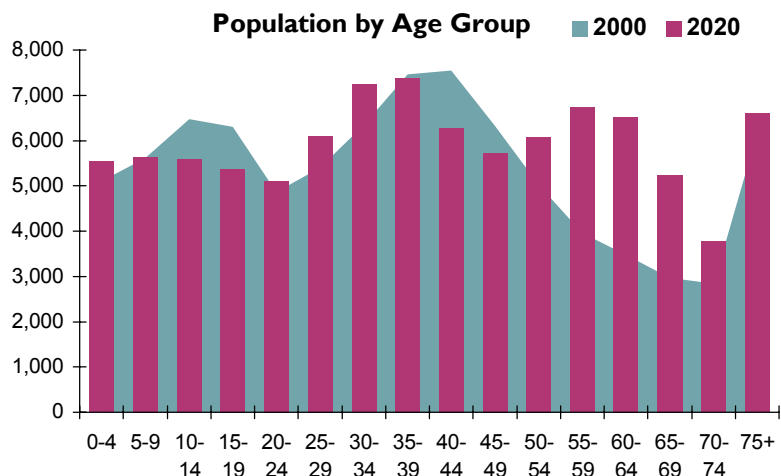
	0-4	5-9	10-14	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75+
2000																
Male	2,603	2,888	3,417	3,326	2,944	3,101	3,583	4,076	4,137	3,396	2,679	2,007	1,694	1,468	1,279	2,344
Female	2,495	2,728	3,062	2,983	1,921	2,292	2,770	3,389	3,416	2,932	2,334	1,951	1,787	1,505	1,560	3,830
2005																
Male	2,567	2,830	2,982	3,451	3,308	3,428	3,284	3,662	4,005	3,974	3,261	2,537	1,880	1,574	1,230	2,393
Female	2,463	2,716	2,819	2,908	2,480	2,278	2,502	2,880	3,441	3,405	2,852	2,277	1,881	1,690	1,372	3,862
2010																
Male	2,651	2,743	2,898	3,020	3,409	3,843	3,653	3,355	3,586	3,837	3,823	3,098	2,386	1,750	1,324	2,396
Female	2,544	2,639	2,785	2,677	2,417	2,901	2,499	2,613	2,933	3,432	3,315	2,784	2,197	1,781	1,543	3,733
2015																
Male	2,750	2,796	2,798	2,925	3,020	3,978	4,063	3,725	3,265	3,410	3,676	3,630	2,912	2,219	1,473	2,480
Female	2,640	2,691	2,695	2,635	2,216	2,826	3,132	2,602	2,655	2,916	3,330	3,226	2,680	2,076	1,624	3,778
2020																
Male	2,826	2,871	2,847	2,821	2,930	3,506	4,191	4,130	3,628	3,087	3,254	3,483	3,414	2,710	1,874	2,682
Female	2,710	2,765	2,743	2,547	2,179	2,597	3,042	3,246	2,643	2,638	2,826	3,240	3,106	2,535	1,897	3,914

Source: Wisconsin Dept. of Administration, Demographic Services, October 2003

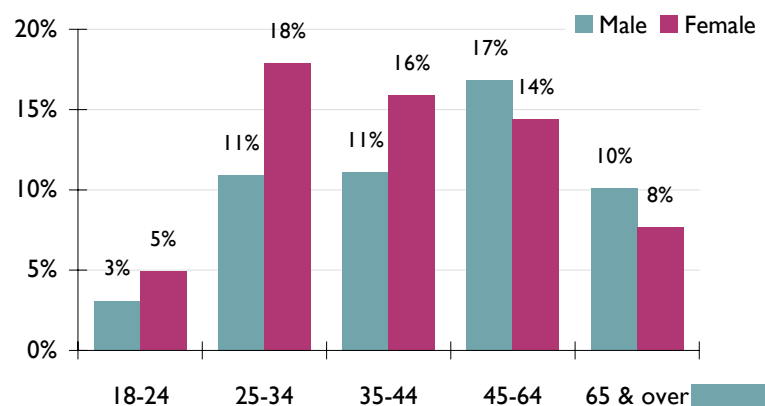
Population projections suggest that Dodge County will gain something like 8,985 people or around 10.5 percent between 2000 and 2020. This is lower than Wisconsin's projected growth of 13.9 percent. As baby-boomers age, 3 cohorts, (55- to 59-year-olds, 60- to 64-year-olds and 65- to 69-year-olds) will each grow by roughly 2,272 to 2,765 people, or 70 to 87 percent. Meanwhile, 2 other cohorts (40- to 44-year-olds and 45- to 49-year-olds) will see their ranks thin by about 603 to 1,282 people or 10 percent to 17 percent.

The group that starts with 3,062 females aged 10 to 14 in 2000 shrinks to 2,417 females aged 20 to 24 in 2010 and rebounds to 3,042 females aged 30 to 34 in 2020. This reflects a sharper dip of college-aged females than non-metropolitan Wisconsin as a whole. Female out-migration is far greater than male out-migration in Dodge. Counties where students can attend bachelor's degree programs tend to see less out-migration of college-aged residents.

The graph to the right shows that advanced education (a bachelor's degree or more) used to be more common among males than females, but recent decades have reversed this trend. Recent graduates are some of the most mobile workers, and more likely to consider other locales for their industry mix and occupational offerings.



Percent of age group with at least a Bachelor's degree in Dodge County



Source: US Dept. of Commerce, Census 2000, Summary file 4, QT-P20

Labor Force Characteristics

The labor force participation rate (LFPR) is the proportion of the eligible population that either works or looks for work. Generally, labor force participation rates tend to peak between the ages of 35 and 54. Members of younger cohorts often occupy themselves with education or parenting. Slowly at age 55, and more quickly at age 62, labor force participation rates fall as older workers leave the labor force.

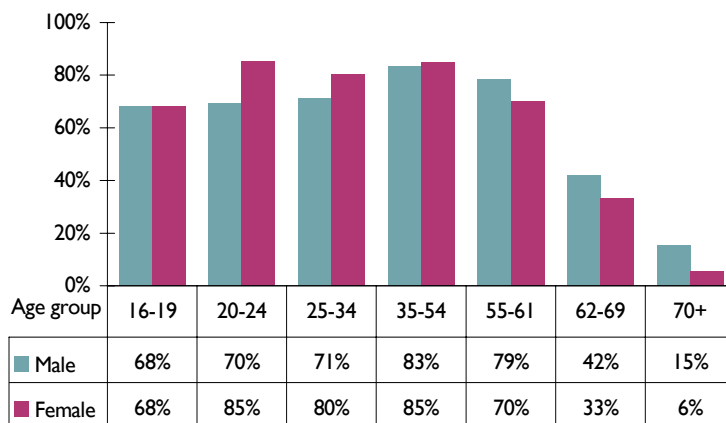
Population trends seen on page 2 cast a different light on labor force participation rates shown in the upper right graph. Large numbers of people will move from the three cohorts between 35 and 49 years old (where LFPR is high) into the cohorts between 55 and 69 (where LFPR is lower). This will pull down the county's overall LFPR.

In recent years, Wisconsin's LFPR has been among the 5 highest in the nation, and Dodge County's was somewhat higher until 2002. (See middle right graph.) The graph to the lower right suggests that the high labor force participation rates of those aged 35 to 44 cannot compensate for their declining numbers, while the increase of those aged 55 to 64 will be so great as to overcome their low LFPR and increase their absolute numbers in the labor force. Shifting demographic trends affect employment trends and policies.

In decades past, employers relied on dramatic increases in female LFPR to replace workers leaving the labor force and to keep up with job growth. Today, such sharp increases in female labor force participation are unlikely, particularly among younger cohorts. The upper right graph shows female LFPR exceeding male levels among those aged 16 to 19 or 20 to 24. Together, these trends may prompt employers to ask where replacement workers will come from.

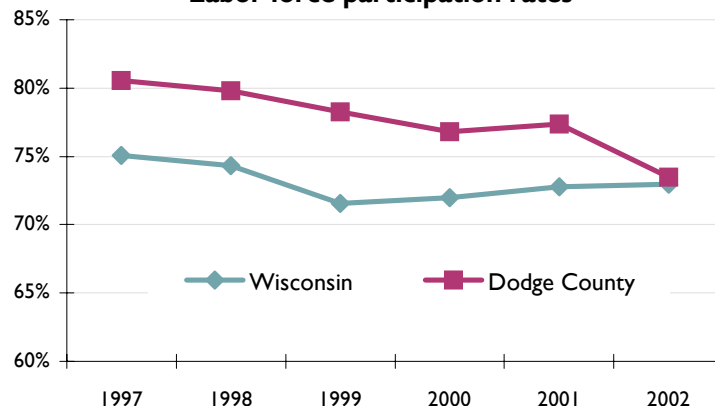
The baby boomers who stay in the labor force longer may find employers modifying compensation and workplace policies to keep them on board. As some baby boomers begin to leave the labor force, they will eventually increase demand for certain types of labor (such as health care and home-related services). Because younger workers often fill these jobs, and because the overall labor force will not grow as quickly as it used to, employers may step up recruitment of younger workers.

Dodge Labor Force Participation by Age & Sex in 2000



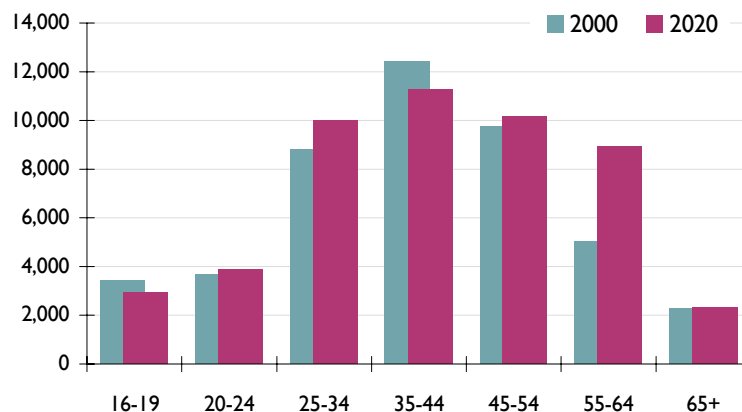
Source: US Dept. of Commerce, Census 2000, Summary file 4, PCT-79

Labor force participation rates



Source: WI DWD, Office of Economic Advisors, 2003

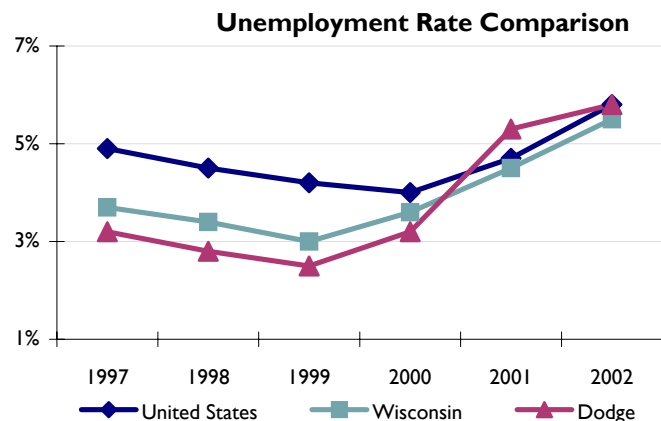
Labor Force by Age in 2000 & 2020 in Dodge County



Source: DWD, Office of Economic Advisors, US Census, SF-4 (PCT-79), WI Demographic Services

Dodge County Workforce Profile

Over the course of 2002, an average of roughly 46,210 Dodge County residents participated in labor force; about 43,536 were employed and approximately 2,674, or 5.8 percent, were unemployed. Although recent unemployment rates are not as high as peaks of 1992 and 1993, they are quite a contrast from the lows of the late 1990s. Despite encouraging national indicators, the local unemployment rate remained well above typical levels for each month of the first ten months of 2003 and had not shown sustained signs of abating significantly at the time this profile was written.



Dodge County Civilian Labor Force Data

	1997	1998	1999	2000	2001	2002
Labor Force	47,745	47,968	47,110	48,194	48,327	46,210
Employed	46,218	46,617	45,932	46,660	45,772	43,536
Unemployed	1,527	1,351	1,178	1,534	2,555	2,674
Unemployment Rate	3.2%	2.8%	2.5%	3.2%	5.3%	5.8%

Source: WI DWD, Bureau of Workforce Information, LAUS program, 2003

Occupations in demand

Dodge County is part of Wisconsin's south central region. In its upper portion, the table to the right lists those occupations projected to experience the fastest proportional growth between 2000 and 2010. An occupation starting with few jobs doesn't need to add many to grow quickly. Altogether, the fastest-growing occupations accounted for 1.4 percent of the region's jobs in 2000 and are expected to account for 2.0 percent of the region's jobs in 2010, so it is not an exhaustive list of opportunities. The list does not support the notion that most jobs require a bachelor's degree.

In its lower portion, the table lists those occupations projected to generate the most openings between 2000 and 2010. The less training a job requires, the less likely an employer is to invest in retention incentives (such as wage or benefit increases). Nursing requires more training than the other occupations generating the most openings. Challenging work schedules and conditions raise turnover, yet nursing programs have long waiting lists. As many nurses and nursing instructors approach retirement, aging baby-boomers will increase demand.

South Central Region Occupation Projections: 2010

	Top Ten Occupations	Education & Training Typically Required*	Average Wage**
Fastest Growth	Computer Soft Engrs Sysms Soft	Bachelor's degree	\$30.38
	Computer Support Specialists	Associate degree	\$20.03
	Computer Software Engrs Apps	Bachelor's degree	\$30.31
	Desktop Publishers	Postsecondary voc. trng	\$14.98
	Network Sysms/Data Comm Anal	Bachelor's degree	\$24.96
	Network/Computer Systems Admin	Bachelor's degree	\$25.79
	Medical Assts	1-12 mo. on-the-job training	\$12.75
	Medical Records/Health Info Techs	Associate degree	\$13.33
	Fitness Trainers/Aerobics Instruct	Postsecondary voc. trng	\$11.63
	Database Administrators	Bachelor's degree	\$25.64
Most Openings	Comb Food Prep/Serv Wrk/Incl Fast	1-month or less training	\$8.57
	Retail Salespersons	1-month or less training	\$10.09
	Cashiers	1-month or less training	\$7.81
	Waiters/Waitresses	1-month or less training	\$6.87
	Registered Nurses	Bachelor's degree	\$22.76
	Office Clerks/General	1-month or less training	\$11.78
	Labrs/Frght/Stock/Matrl Movers/Hand	1-month or less training	\$10.87
	Customer Service Reps	1-12 mo. on-the-job training	\$13.90
	Janitors/Cleanrs Ex Maids/Hskpng	1-month or less training	\$9.84
	Stock Clerks/Order Fillers	1-month or less training	\$10.40

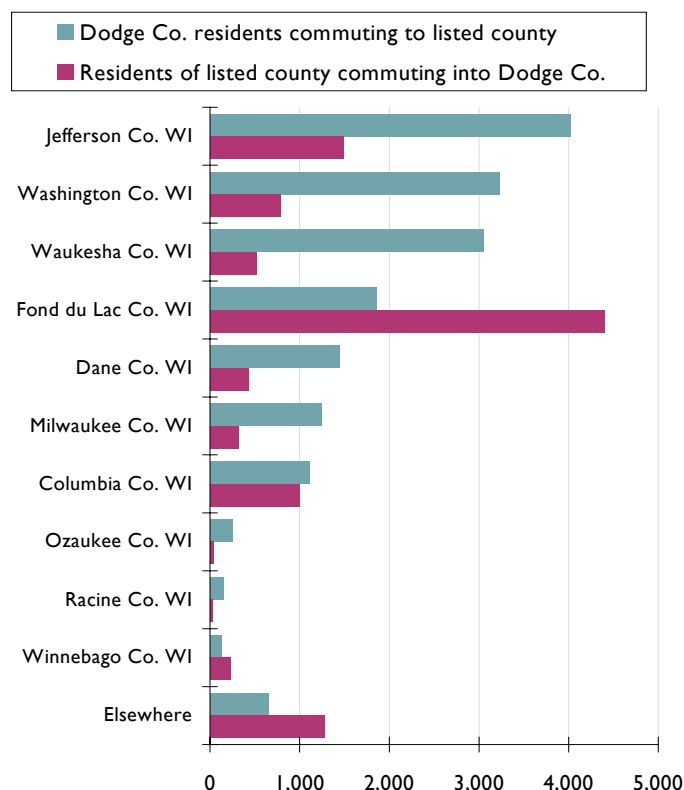
* The most common way to enter the occupation, not the only way

** Wages from Occupation Employment Statistics survey responses for region, 2001
South Central WDA includes Columbia, Dane, Dodge, Jefferson, Marquette and Sauk counties.

Source: WI DWD, Bureau of Workforce Information, 2002

County Commuting Patterns

In April 2003, the Census Bureau released county-to-county worker flow files, also known as county commuting patterns. Derived from those files, the chart and table below are dominated by workers coming in to Dodge County from Fond du Lac County and workers leaving Dodge for Jefferson, Washington, and Waukesha counties.



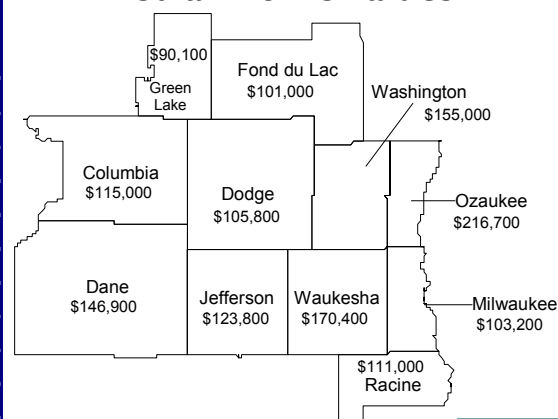
Because Watertown straddles the southern border and Waupun straddles the northern border, people can cross county lines without traveling great distances. Mayville and Ashippun are also close to borders. The 2000 Census reported about 60 percent of Dodge County workers traveled less than 20 minutes for work and 76 percent traveled less than 30 minutes.

Dane and Waukesha counties offer higher wages, but their housing costs may encourage some workers to commute to jobs in those counties rather than living there. Median home values listed in the map below lend some support to this hypothesis. Population trends on page 1 lend further support, albeit ambiguous support. In Dodge County, net migration (people moving in minus people moving out) accounts for six times as much population growth as natural increase (births minus deaths). Of the people moving into the county between 1995 and 2000, 76 percent were from other Wisconsin counties. Available data does not specify which counties or how many in-migrants kept working in their former county of residence, thus the ambiguity.

Industry mix also plays a part in commuting patterns. Dodge County is strong in manufacturing and construction, while Jefferson offers more retail opportunities, Washington offers financial activities and Dane and Waukesha offer professional & business services jobs. Industry-specific jobs pull workers across county lines.

	Dodge Co. residents commuting to listed county	Residents of listed county commuting into Dodge Co.	Net gain or loss of workers
Jefferson Co. WI	4,021	1,491	-2,530
Washington Co. WI	3,230	791	-2,439
Waukesha Co. WI	3,051	514	-2,537
Fond du Lac Co. WI	1,852	4,401	2,549
Dane Co. WI	1,440	427	-1,013
Milwaukee Co. WI	1,241	318	-923
Columbia Co. WI	1,115	1,001	-114
Ozaukee Co. WI	246	41	-205
Racine Co. WI	148	32	-116
Winnebago Co. WI	123	225	102
Elsewhere	648	1,272	624

Median home values



Source: US Dept. of Commerce, Census 2000, County-to-county worker-flow files

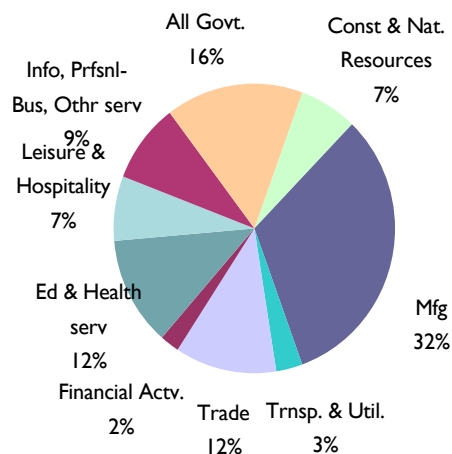
Census 2000, Summary File 3, QT-H14

Industry Employment -

Introducing NAICS (North American Industry Classification System)

From the 1930s to 2002, some version of the Standard Industrial Classification system has defined categories for employment-by-industry estimates. Beginning in 2003, the North American Industry Classification System (NAICS) replaces SIC. The table below lists each system's major categories. A quick glance shows that NAICS offers categories for which data was previously unavailable (like leisure & hospitality or education & health services) and that NAICS offers less detail in other places (retail trade and wholesale trade are rolled up into one category for non-metropolitan areas).

Dodge County Industry Distribution: 2002



The table below hides one wrinkle that may be the most important aspect of SIC-to-NAICS conversion. **Even if a category carries an identical title, like “manufacturing”, its definition changed, so comparisons of SIC data to NAICS data carry limited meaning.** The SIC definition of manufacturing included establishments that now reside in the services category. Elements of printing are now in information services; some establishments providing professional, technical, administrative or support services may have moved from manufacturing into services. These are just a few examples of changes that limit useful comparison of historical SIC data to current NAICS data. (Also, NAICS data was revised when more information became available; while SIC data was not, due to discontinuation.)

Under SIC, restaurants and bars were under retail trade, while NAICS puts them in the newly created leisure & hospitality sector. Other establishments in the leisure & hospitality sector (such as hotels and lodging facilities) came from the services sector of SIC. There is no accurate or reliable way to compare the old trade or services numbers to the new.

Despite setbacks in recent years, Dodge County's manufacturing sector continues to be a key component of the local economy. The correctional facility in Waupun probably boosts government employment estimates by a percentage point or two.

2002 Industry Employment in Dodge County: A comparison of two classification systems

NAICS Super-sectors	Employment	Distribution	SIC Industry Divisions	Distribution
Construction, natural resources & mining	2,201	7%	Construction & Mining	6%
Manufacturing	10,825	32%	Manufacturing	34%
Transportation, warehousing & utilities	981	3%	Transportation, utilities & communication	4%
Trade (wholesale & retail)	3,932	12%	Wholesale trade	3%
			Retail trade	14%
Financial activities	744	2%	Finance, insurance & real estate	2%
Information, professional & business services, other services	2,974	9%	Services & misc (incl. agr, forestry, fishing)	21%
Education and health services	3,994	12%	Government	15%
Leisure & hospitality	2,480	7%		
Government	5,251	16%		

Source: WI DWD, Bureau of Workforce Information, Current Employment Statistics Program, March 2003

Dodge County Workforce Profile

Listed in the table at the middle of the page, the 10 largest private employers in Dodge County accounted for roughly 21 percent of the payroll jobs reported in the county in the first quarter of 2003. Employers' figures vary from month to month, with seasonality differing significantly from employer to employer. For these and other reasons, specific ranks are not necessarily consistent or telling.

Listed in the top table, the ten largest industry groups provided approximately 54 percent of the county's reported jobs. Metal fabrication and machinery manufacturing have suffered plant closures recently, but a highly skilled workforce remains. Healthcare related employers may face the opposite problem in years to come: demand for skilled workers exceeding supply.

Top 10 Industry Groups in Dodge County

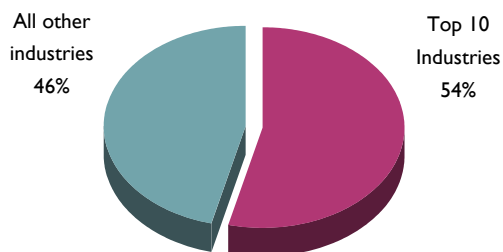
Industry Group	March 2003		Numeric change 2002 - 2003
	Employers	Employees	
Fabricated Metal Product Manufacturing	44	2,752	-279
Machinery Manufacturing	26	2,455	-137
Educational Services	16	1,959	60
Food Manufacturing	23	1,952	-39
Food Services and Drinking Places	116	1,715	-72
Nursing and Residential Care Facilities	19	1,618	68
Printing and Related Support Activities	*	*	*
Justice, Public Order, & Safety Activity	*	*	*
Hospitals	3	1,530	14
Executive, Legislative, & Gen Government	39	851	74

*data suppressed to maintain confidentiality

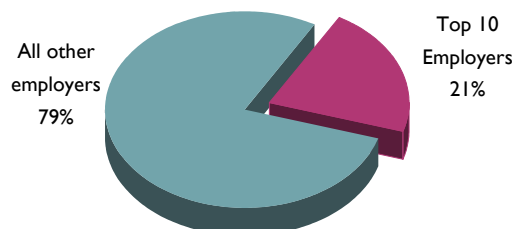
Top 10 Private Employers in Dodge County

Company	Product or Service	Size
Quad/Graphics, Inc.	Commercial printing	1000 +
Deere & Co.	Lawn & garden equipment manufacturer	1000 +
Beaver Dam Community Hospital	Acute care, nursing care, assisted living and child care	500-999
Grande Cheese Co.	Cheesemaker	500-999
Watertown Memorial Hospital, Inc.	Hospital, satellite clinics and senior housing	500-999
Metalcraft of Mayville, Inc.	Precision metal fabrication and custom manufacturing	500-999
Michels Pipeline Const., Inc.	Utility engineering, design, and construction contractor	500-999
Mayville Engineering Co, Inc.	Fabricated metal product manufacturing	250-499
John Deere Shared Services	Lawn & garden equip. manuf.	250-499
Beverly Health & Rehabilitation	Nursing care facilities	250-499

Share of jobs with top 10 industries



Share of jobs with top 10 employers



Source: WI DWD, Bureau of Workforce Information, ES-202 special report, First quarter, 2003

Dodge County Workforce Profile

Overall, Dodge County employers reported paying wages slightly below the state-wide all-industries wage, with results varying by industry. The table to the right shows that the county's construction wages (\$42,124) were higher than the state average for the industry (\$39,649), and well above the county's all-industries average (\$30,185). But the bar graph below shows that construction accounted for less than 10 percent of the county's jobs. The next-highest average wage was in manufacturing (\$37,593), which employed more people (11,016) than any other industry. The average wage per manufacturing worker rose between 2002 and 2002, but the number of manufacturing workers fell faster, so total manufacturing wages fell \$24 million. Among the county's 5,096 trade, transportation & utilities jobs, 3,018, or

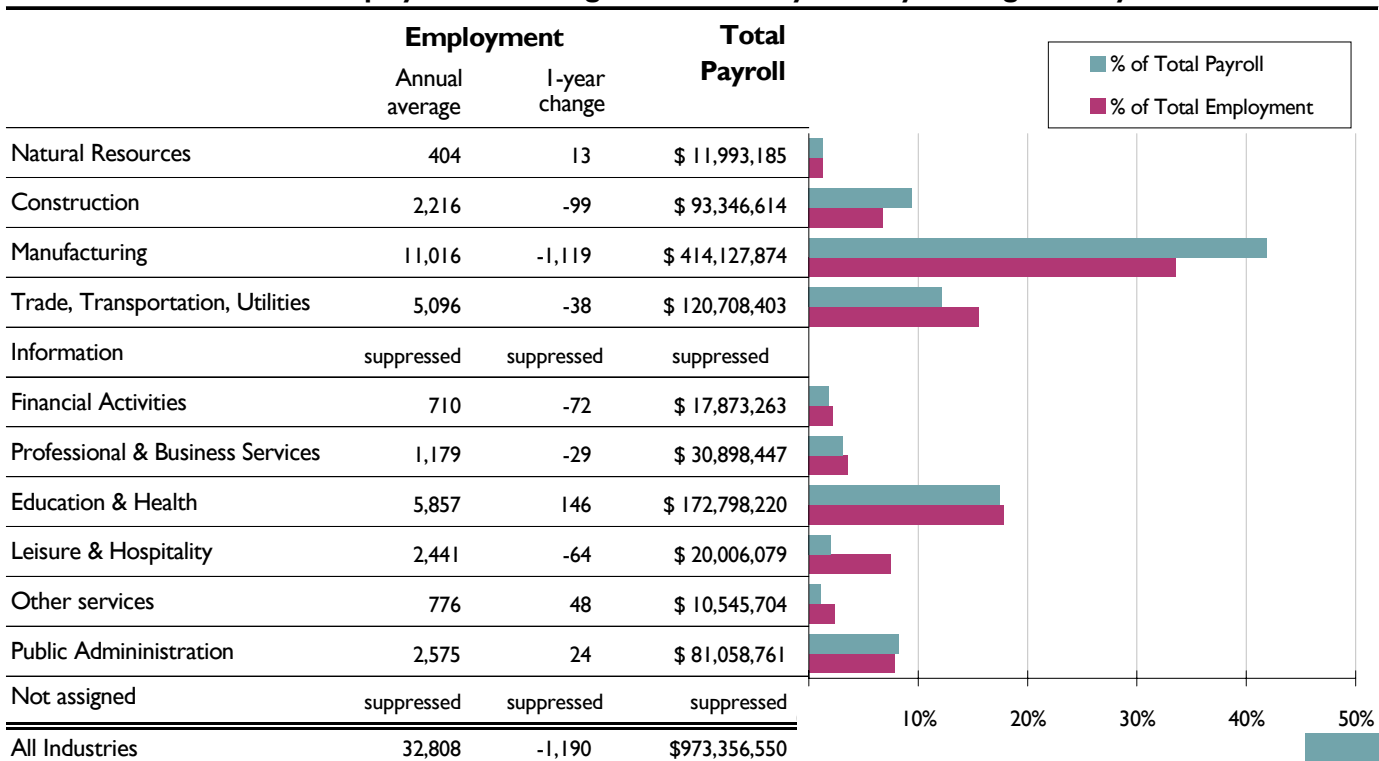
Average Annual Wage by Industry Division in 2002

	Average Annual Wage		Percent of	1-year
	Wisconsin	Dodge County	Wisconsin	% change
All Industries	\$ 32,422	\$ 30,185	93%	2.1%
Natural resources	\$ 25,481	\$ 29,686	117%	2.7%
Construction	\$ 39,649	\$ 42,124	106%	-5.6%
Manufacturing	\$ 40,584	\$ 37,593	93%	4.1%
Trade, Transportation, Utilities	\$ 28,422	\$ 23,687	83%	4.0%
Information	\$ 38,871	suppressed	suppressed	suppressed
Financial activities	\$ 40,337	\$ 25,174	62%	6.9%
Professional & Business Services	\$ 36,324	\$ 26,207	72%	6.2%
Education & Health	\$ 33,768	\$ 29,503	87%	3.9%
Leisure & Hospitality	\$ 11,837	\$ 8,196	69%	4.1%
Other services	\$ 19,500	\$ 13,590	70%	-5.2%
Public Administration	\$ 33,769	\$ 31,479	93%	2.1%

Source: WI DWD, Bureau of Workforce Information, Covered Employment & Wages, August 2003

60 percent were in the retail segment, where average wages were lower (\$18,496) than the utilities segment (\$46,830) or wholesale (\$34,966). Education & health services was the only sector to add a significant number of jobs and increase its annual wages from 2001 to 2002.

2002 Employment and Wage Distribution by Industry in Dodge County



Source: WI DWD, Bureau of Workforce Information, Covered Employment and Wages, August 2003

Per Capita Personal Income

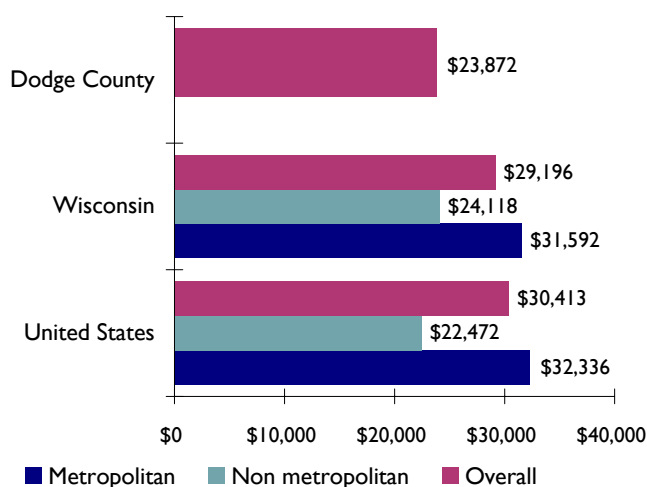
In 2001, Dodge County's per capita personal income (PCPI) of \$23,872 was slightly below non-metropolitan Wisconsin's PCPI (\$24,118) and above the national non-metropolitan PCPI (\$22,472). Between 1996 and 2001, Dodge County's PCPI went from 1.3 percent above non-metropolitan Wisconsin's PCPI to 1.0 percent below non-metropolitan Wisconsin's PCPI. Meanwhile, Dodge County PCPI climbed from 3.9 percent above the national non-metro PCPI to being 6.2 percent above the national non-metro PCPI).

Growth in PCPI relates to demographic shifts (see pages 2 and 3). As a greater share of the population enters retirement, more residents rely on transfer payments (such as Social Security) and fewer have net earnings (typically associated with employment). Transfer payments grow much more slowly than net earnings. Households with substantial investment income (dividends, interest or rent, including retirement or pension plans) are more likely to consider warmer climates for retirement, so PCPI growth may slow considerably.

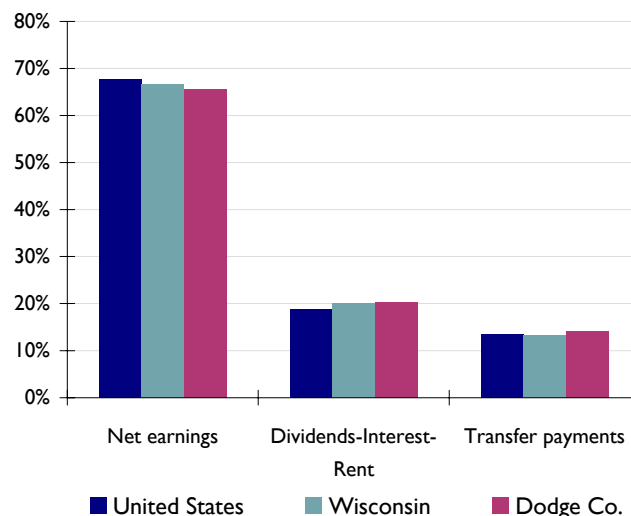
Per Capita Personal Income

	1996	1997	1998	1999	2000	2001	Percent Change	
							1 year	5 year
United States	\$24,270	\$25,412	\$26,893	\$27,880	\$29,760	\$30,413	2.2%	25.3%
Wisconsin	\$23,301	\$24,481	\$26,004	\$26,926	\$28,389	\$29,196	2.8%	25.3%
Dodge County	\$19,120	\$20,186	\$21,594	\$22,002	\$23,078	\$23,872	3.4%	24.9%

2001 PCPI



Components of Total Personal Income: 2001



Source: US Dept. of Commerce, Bureau of Economic Analysis, State & Local Personal Income, May 2003, CA1-3, CA05

WWW addresses of source data

Wisconsin population estimates and projections:

<http://www.doa.state.wi.us/dir/index.asp>

Education levels of population, labor force participation rates, commuting patterns:

<http://www.census.gov/main/www/cen2000.html>

Labor force estimates (employed and unemployed), industry employment, average annual wages:

<http://www.dwd.state.wi.us/lmi/>

Occupations in-demand:

http://www.dwd.state.wi.us/lmi/wda_map.htm

Per Capita Personal Income:

<http://www.bea.gov/bea/regional/reis>

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